



## **Customer Success Story**

How DocuSign  
Fuels Global Growth  
with Consistent,  
High-quality RFPs

### **Success Snapshot**

- Handled a 200% increase in RFP submissions more efficiently
- Finished security questionnaires in hours vs. days
- Expanded from 25 to 132 internal users
- Improved proposal quality and consistency



## About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. More than 562,000 customers in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

## Challenge

# Streamlining the RFP Response as DocuSign Expands Globally

DocuSign, which offers the world's #1 e-signature solution as part of the DocuSign Agreement Cloud, is growing exponentially. When Julie McCoy, CF APMP, joined DocuSign four years ago, the company had about 1,000 employees. Now, it has over 4,000 employees around the globe.

"When I started with DocuSign, we didn't have a proposal department," says Julie. "Everyone created their own content for proposals. We joked that it was the Wild West."

As a Senior Manager, Julie created a Proposal Department and set up clear processes for responding to RFPs. However, answering RFPs was still manual work. The team used an Excel spreadsheet and a large Word document (which frequently crashed) to copy and paste responses into proposals. This process made it hard for Julie's team to respond quickly to RFPs and Security Questionnaires—which often had hundreds of questions and needed customized answers.

With their team growing globally, DocuSign also faced challenges with scaling, standardization, and consistency in their response processes, which was critical to their customer's perception of the company and DocuSign's overall win rate.



**“My main priority when selecting a tool was user-friendliness.”**

Julie McCoy | CF APMP  
Sr. Manager, Proposal Department

## Solution

# Adopting Loopio to Automate and Standardize Proposals

In late 2018, Julie implemented RFP management platform, Loopio. It gave the proposal team a centralized library of pre-approved RFP content as well as a way to track, manage, and collaborate on responses—all of which made it easier to standardize RFPs and security questionnaire processes.

When selecting a platform, Julie looked for usability and simplicity. “My main priority when selecting a tool was user-friendliness,” she says. “I didn’t want something that forced us to click through lots of pages to locate the right information. Loopio is very logical, making it easy for my team to find data.”

She also appreciated Loopio’s clear, straight-forward pricing, which wouldn’t vary based on the volume of RFPs they managed through the platform. “Since we are growing rapidly, it would be challenging for us to have volume-based pricing. With Loopio, we don’t have variable costs.”



**“Loopio really helps our team scale to meet the volume of RFPs we receive. Between Magic and the library, we are able to quickly answer the majority of questions and spend more time on customizing the response to our customers.”**

Alex Green | Proposal Manager

## Solution (continued)

Julie initially introduced Loopio to her North American team with 25 users. The team particularly loved Loopio’s Magic feature because it populated the answers to questions from the library into proposals automatically—which saved hours filling out responses.

Based on their success, Julie then rolled Loopio out to 132 global users a year later. The regional Solutions Engineers—who were responsible for answering technical inquiries—loved having a tool that saved them time and centralized all response management. Loopio also made it simpler for them to indicate when content needed updates so that the proposal team could review and approve changes quickly.





“We’ve grown very reliant on Loopio’s efficiencies. I don’t see how we could go back to manual processes.”

Julie McCoy | CF APMP  
Sr. Manager, Proposal Department

## Results

# DocuSign Responds to 3x the RFPs While Maintaining Quality and Consistency

Since implementing Loopio, Julie and her team have achieved the following results:

- **Completed more RFPs.** In the past year, Julie has seen a 200% increase in the volume of RFP requests that her team receives. With Loopio, they have met this demand in a scalable way.
- **Higher quality responses.** By reducing the time spent on the most repetitive parts of the RFP process, Julie’s team customizes responses that better speak to each customer’s needs. Plus, the library of pre-approved content ensures answers are consistent across regions.
- **Saved time.** Security questionnaires used to take days to fill out. Now, thanks to the automation of repetitive tasks, requests can be expedited.

In the future, Julie plans to roll out Loopio to DocuSign’s Trust Services and Compliance teams. These groups have proprietary content that they need to access quickly—but they also need to ensure that unauthorized users won’t see it, which Loopio’s permissions tools can support.

## Testimonials

# Why DocuSign Loves Loopio



“In the past, we had to ‘go fishing’ into old RFPs for answers to questions. We also lacked cohesion in delegating responsibility for particular sections of an RFP. Loopio fixes both of these issues by being able to efficiently assign work items to the team and empowering these teammates to answer an RFP quickly.”

**Ernesto Carrera** | Manager, Sales Engineering



“A few months after we deployed, I received an email from a SE leader with the subject line ‘Loopio saved my bacon for the 1000<sup>th</sup> time’—they had just used Loopio’s Magic capability to respond to a security questionnaire in under 30 minutes (a task that normally took hours).”

**Leah McTiernan** | Vice President, Solution Engineering



“Loopio’s Customer Support team has been a key differentiator for us. Any time we have an issue, they are extremely helpful and quick to respond. They’ve also taken our product enhancement requests and worked with the product team to turn it into functionality.”

**Alex Green** | Proposal Manager



“Loopio enables me to quickly respond to detailed questions that I don’t hear every day. In turn, it enables me to remain agile and responsive to the customers and team I support.”

**Shara McNeill** | Sr. Solutions Engineer



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## About Us

Loopio's RFP Response Software supercharges the way enterprises respond to RFPs, DDQs, and Security Questionnaires

**Want to see Loopio in action?**

[Request a Demo](#)